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A working party of the Engineering Employees' Federation in the Lancashire and Cheshire region in England met to consider management training and development, to examine the arrangements for management training and development in large companies, and to make recommendations to small and medium sized ones. Data collected from companies through a questionnaire showed that little formalized training was taking place in small companies, while visits to two large companies revealed a wider formalized approach. The Confederation of British Industry has formed, with other groups, the Council of Industry and Management Education to supervise the expansion of training in management subjects, to restrain proliferation, and to correct deficiencies. It was recommended that charts be kept on employees showing job specification, staff review, and present management structure, situation to be achieved in three years, ages of existing job holders, and predicted succession of individuals. Examples of all these charts are included in the document. (nl)

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ENGINEERING EMPLOYERS' FEDERATION

Lancashire and Cheshire Region

REPORT

OF

WORKING PARTY

ON

MANAGEMENT TRAINING AND DEVELOPMENT

A20 034

JUNE 1968 — PRICE 5/-

ENGINEERING
EMPLOYERS'
FEDERATION

Lancashire and Cheshire Region

REPORT

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Contents

Page

WHITE

1. Composition of Working Party and Terms of Reference... 1
2. Summary of Recommendations 4

BLUE

3. Reports on Visits and Questionnaire 7
4. Recommendations 8
5. Sample Documentation 13

YELLOW

6. Sample Forms 27
7. Recommended Reading 31

1

Working Party — Management Training and Development

Mr. G. L. Woodcock (Chairman)	—	Director and Company Secretary
Mr. L. G. Marshall	—	Executive Director
Mr. B. E. L. Morton	—	Personnel Director
Mr. H. Walker	—	Staff Manager
Mr. T. Rowlands	—	Regional Training and Education Officer

The terms of reference of the Working Party were:—

1. To consider the Development and Training of Managers using for guidance the following publications:—
   (*a*) AN APPROACH TO THE TRAINING AND DEVELOPMENT OF MANAGERS — Central Training Council.
   (*b*) IMPROVING MANAGEMENT PERFORMANCE — J. W. Humble.
   (*c*) THE MAKING OF MANAGERS — (Final Report of the B.I.M. Management Schemes Committee).
2. To examine the arrangements existing in large companies for the Training and Development of Managers.
3. To make recommendations considered acceptable to small and medium-sized companies for the Training and Development of Managers.

WORKING PARTY—

Management Training and Development (continued)

The Working Party met on four occasions for discussion. The Chairman and the Regional Training and Education Officer made three visits (Lucas, Pilkingtons and Liverpool University) and the Regional Training and Education Officer two further visits (St. Helens College of Technology and Kellogg Co.). The Working Party acknowledge the help and co-operation of these organisations.

The Working Party found by the completion of a questionnaire by a number of companies that very little in formalised management training was taking place in small companies. This does not imply that no management training is done at present. The requirements of the E.I.T.B., however, will be for formal programmes and records to be maintained.

Visits to two large companies revealed a much wider formalised approach covering principally:—

The recruitment of graduate management trainees.
Regular management development, appraisals and reviews.
Training to Diploma in Management Studies level at a College of Technology.

The Working Party concluded that much could be fruitfully done by smaller companies on similar lines to that done by larger companies but modified and simplified to the needs of the smaller company.

The Working Party's recommendations illustrate, they believe, the minimum action as essential for a small company. Much good material is available in the two booklets mentioned in Section 7 and it should be possible for a smaller company to implement management training schemes within a comparatively short time, provided senior management gives active support to the proposals. This is emphasized by the recent C.B.I. publication "Industrial Management and the Next Two Years" in the following extract:—

"A. **MANAGEMENT COMPETENCE**

1. **Training**

The facilities for training in management subjects have enormously expanded in recent years. The C.B.I. has constituted with other interested bodies the Council of Industry on Management Education largely to watch over this development, to restrain proliferation and to make good deficiencies. To a large degree the places available in the various universities, colleges, schools and other

institutions are well filled. The results of all this work are becoming more and more apparent in the form of alert and technically qualified middle managements. There seems to be, however, some hindrance to their being able to use their abilities to the full arising from **higher managements** being unacquainted with the techniques they have caused to be inculcated in their up and coming men. If the use of modern management techniques is not to be resisted or neglected, it is essential for **higher managements** to have at least a sufficient understanding of their character and purpose.

There is an urgent need for **higher managements** to demand and the various institutions to supply more appraisal courses to overcome this deficiency."

2

Summary of Recommendations

The Working Party recommends that in any Company contemplating management training the senior executive should prepare a three stage plan on the following lines:—

		Page Ref.
1.	**Preparation of organisation charts showing:**	
	(*a*) the existing Company management structure	14
	(*b*) future management structure, as seen by the controlling executive	15
	Such charts may reveal problems of succession arising from retirements, promotions, etc.	17
2.	**Writing of job specifications showing:**	
	(*a*) the basic function and specific responsibilities of each management key job	18 23 25 28
	(*b*) the qualities, qualifications and experience required to perform them effectively.	19 24 26 29
	Job specifications of this kind make for a more realistic succession/recruitment programme and help in the setting of standards.	
3.	**A staff review:**	
	(*a*) to confirm the names of those with potential for promotion and identify deficiencies in the line of succession.	20 30
	(*b*) to plan experience (including movement between departments or functions) and confirm training which will encourage better performance or help those who are destined for greater responsibilities	21 22

Training and development should be planned according to performance, as measured against the specific responsibilities in the

existing job, or for the individuals integration into another or senior job.

As this booklet was being prepared, the Engineering Industry Training Board published its Booklet No. 6 "The Training of Managers". The recommendations of the Working Party do not conflict in any way with Booklet No. 6, which should be carefully studied by senior executives. In particular, the Working Party draws attention to paragraph 36 in Booklet No. 6 which reads:

> "In order to encourage the introduction of formal schemes of management training through job description and performance appraisal, a MANAGEMENT DEVELOPMENT SUPPLEMENTARY GRANT will be made available. This grant may be paid on the presentation of evidence that a scheme following the principles laid down in this booklet (No. 6) is in full operation."

3

Report on Visits and Questionnaire

The companies interviewed in the survey generally realised the importance of selection of management potential and the bearing that it has upon future management policy and efficiency.

Some companies intended to recruit from within the existing management structure while other companies clearly understood that it would be necessary in certain jobs to recruit from outside. Unfortunately not many companies had formulated any review of existing staff and in the very small companies they felt that written appraisal was unnecessary because the most senior executive was on familiar terms with all members of the total labour force.

The development of any company must depend on the competence of its labour force and therefore very serious thought must be given to and directed towards, its manpower value. One of the most fundamental problems which companies face is to improve the educational standard of junior management making them suitable for promotion and succession to higher management positions. There appears to exist an inadequate number of self motivated employees, who have studied in their own time and have attained a suitable level of education to succeed to the more senior management positions.

4

Recommendations

Page Ref.

1. CHARTS

It would be wise for the chief executive to prepare a chart of the existing management structure and another showing the desirable position in three years' time. Job titles should be shown and should indicate job responsibility.

The chart of existing management should show the ages of existing job holders and the size and composition of units for which they are responsible.

The future chart should indicate the succession of individuals from their present to future positions.

Study of these charts will indicate the problems which management will have to face at some future date. 27

2. JOB SPECIFICATION

The writing of job specifications is considered by the Working Party to be a most difficult and important aspect of the recommendations. At the same time the preparation of the specification clarifies many hitherto obscure responsibilities and immediately reveals existing deficiencies in the management structure.

Job specification requires an analysis of the factors which determine job level. In this context, a few jobs depend on a single factor or some key activity, but for most jobs in management it is necessary to consider the typical activities, the decisions (or recommendations) which the job holder has to make in the course of these activities, the extent of supervision which he receives and the extent to which he supervises other people. It is also helpful to consider the level of background knowledge and skill which are normally required when the job is started.

Page Ref.

The information may be obtained by questionnaire, interview, direct observation, group discussion or any combination of these methods. The questions which may be asked vary greatly from job to job and the phrasing may have to be slightly different for each job holder. 28

Basic Function

The first stage is to establish the reason for the job, because target setting, key results and appraisals of individual performance are dependent upon a clear understanding of the job's basic function. Therefore each job must be clearly defined.

Job Description

The job description should then be prepared, illustrating the responsibilities in terms of:—

(*a*) Organisation.
(*b*) Finance.
(*c*) Personnel.
(*d*) Plant & Equipment.
(*e*) Liaison.

Part two of the job specification analyses the personal qualities, qualifications and experience required by any individual to perform the job effectively. 29

3. STAFF REVIEW

Job Specification is based on analysis of the personal qualities, experience and so on, which the job requires. Training is based on a detailed analysis of the knowledge, skills and attitudes required for good performance. Target-setting and performance assessment start with an analysis of the key results which are to be achieved. A periodic 30
review must be made to reveal, in each individual, the field which lies between his present performance and the performance required in his present or future job. The difference between his achievements and the job requirements, as laid down in the Job Specification, reveals the area in which future training is required. 21

4. TRAINING

Page Ref.

The majority of training is likely to be on-the-job under the guidance of his immediate manager and may include movement between departments according to the development plan and potential of the individual. Some formal education and training may also be necessary providing it is relevant to the existing job, or to some appointment in the foreseeable future. 22

> "From the Company's point of view, the economic justification for training is that it should lead to improved performance of existing managers and also help to develop those who may be required to fill future managerial vacancies. Training plans should therefore be based on a periodic assessment of present and future needs. This assessment should indicate the recruitment and promotions that may be necessary to meet normal wastage, retirements and transfers and must also take account of estimated future growth or possible reorganisation arising, for example, from reviews of marketing plans or business budgets. The forecast of future needs should extend as far ahead as is practicable, to give time for the adequate training of those selected for higher management positions. It may also give a timely indication of the need to consider an appointment from outside the organisation."—(Extract from "AN APPROACH TO THE TRAINING AND DEVELOPMENT OF MANAGERS").

5. DEVELOPMENT

Development should be considered in two distinct areas:—

(*a*) for a better performance of the existing job; and

(*b*) for the future integration into another or more senior job.

Knowing that there is a capacity for self development in the individual as revealed by the staff review, development must be planned and directed to suit individual and company requirements.

The development plan should be agreed by the individual and his immediate Manager in order to ensure that energies and effort are directed along the required lines. Development will be mainly within the company. It may be necessary for visits to other establishments to take place if the company is small and wishes to improve existing methods. The Working Party were convinced of the value of local meetings between member firms under the guidance of Association Training Officers to encourage inter-firm discussion and co-operation in training matters. When this exercise is necessary the visits must be arranged to provide maximum benefit to both company and manager and with the co-operation of the company selected to provide the knowledge.

External training courses, carefully selected, will be needed to encourage new thinking. Senior management should make an appraisal of such courses before nominating their staff and should obtain reports (not necessarily immediately on completion of the Course) to try and assess their value.

6. EDUCATION

Attendance on Block Release type courses is sometimes desirable, providing the person is suitably qualified, to improve the general understanding of the broader aspects of management functions.
One type of Block Release Course is as follows.:—

STAGE I — Two periods of three weeks and one period of two weeks — spread over one year.

Subjects: Applied Ecomonics
Quantitative Methods
Human Relations
Structure of Industry

STAGE II — Four periods of three weeks and two periods of two weeks — spread over two years.

Subjects: Principles of Management	Management Techniques
Planning & Control	
Work Study	
Organisation & Method	
Operational Research	
Electronic Computer Application	
Graphical Presentation and Analysis	
Office Management	Functional Subjects
Production Management	
Marketing Management	
Purchasing Management	
Research & Development Management	
Industrial Relations and Personnel Management	
Business Control and Management Finance	
Management Practice	

There are many courses available of a much more specialised nature and shorter duration than the ones illustrated above which deal with special subjects in Production, Financial and Marketing Techniques such as Work Study, Organisation & Methods, Budgetary Control and Costing which would be of use to the smaller unit companies and as a refresher or introductory course to more advanced study and courses of longer duration.

5

Sample Documentation

Management Survey

Training and Development of Managers

□ □ □

Type of Company **METAL FABRICATION**

Address .....

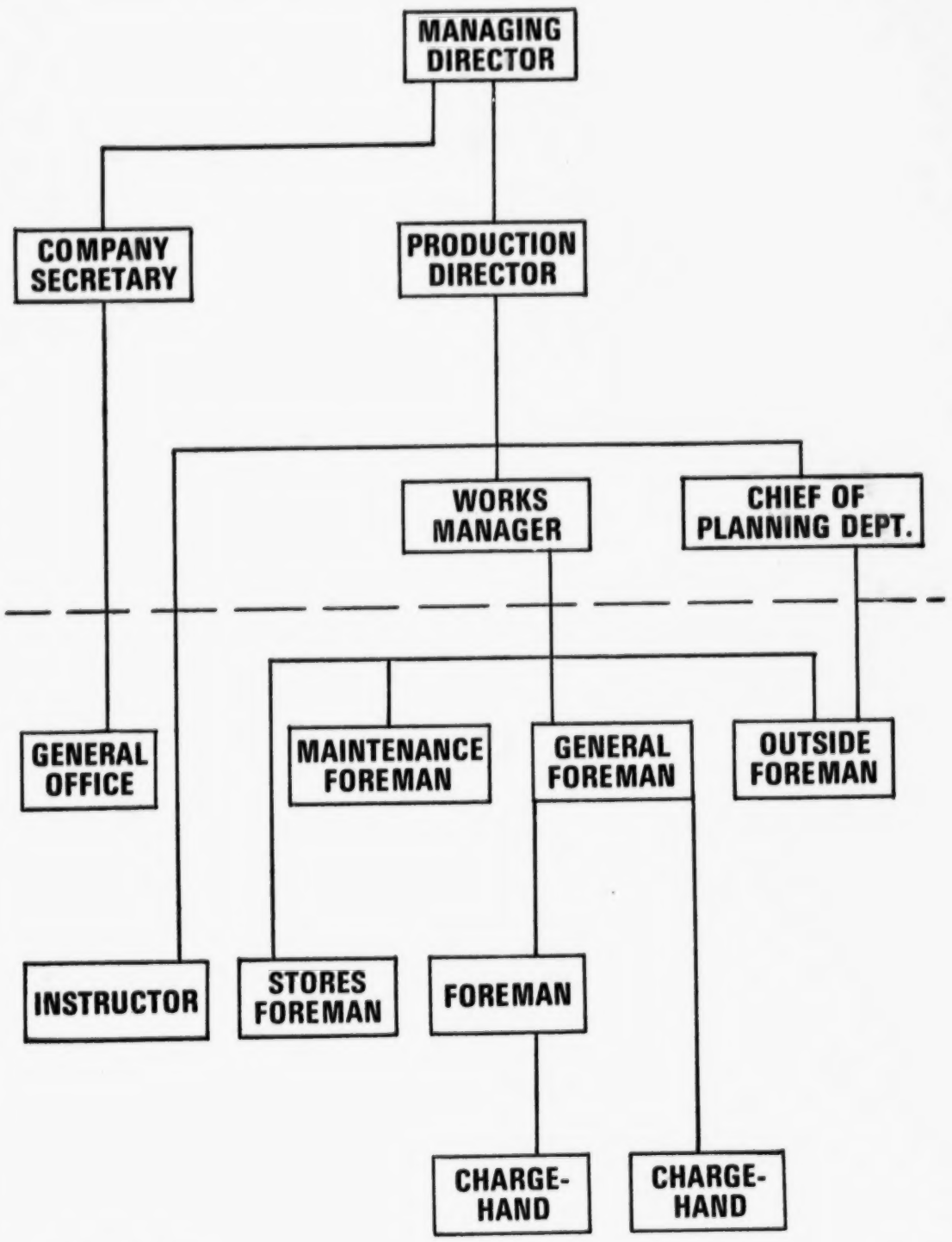
.....

Total number of Employees ..... (*a*) **Manual** **60**

(*b*) **Staff** **20**

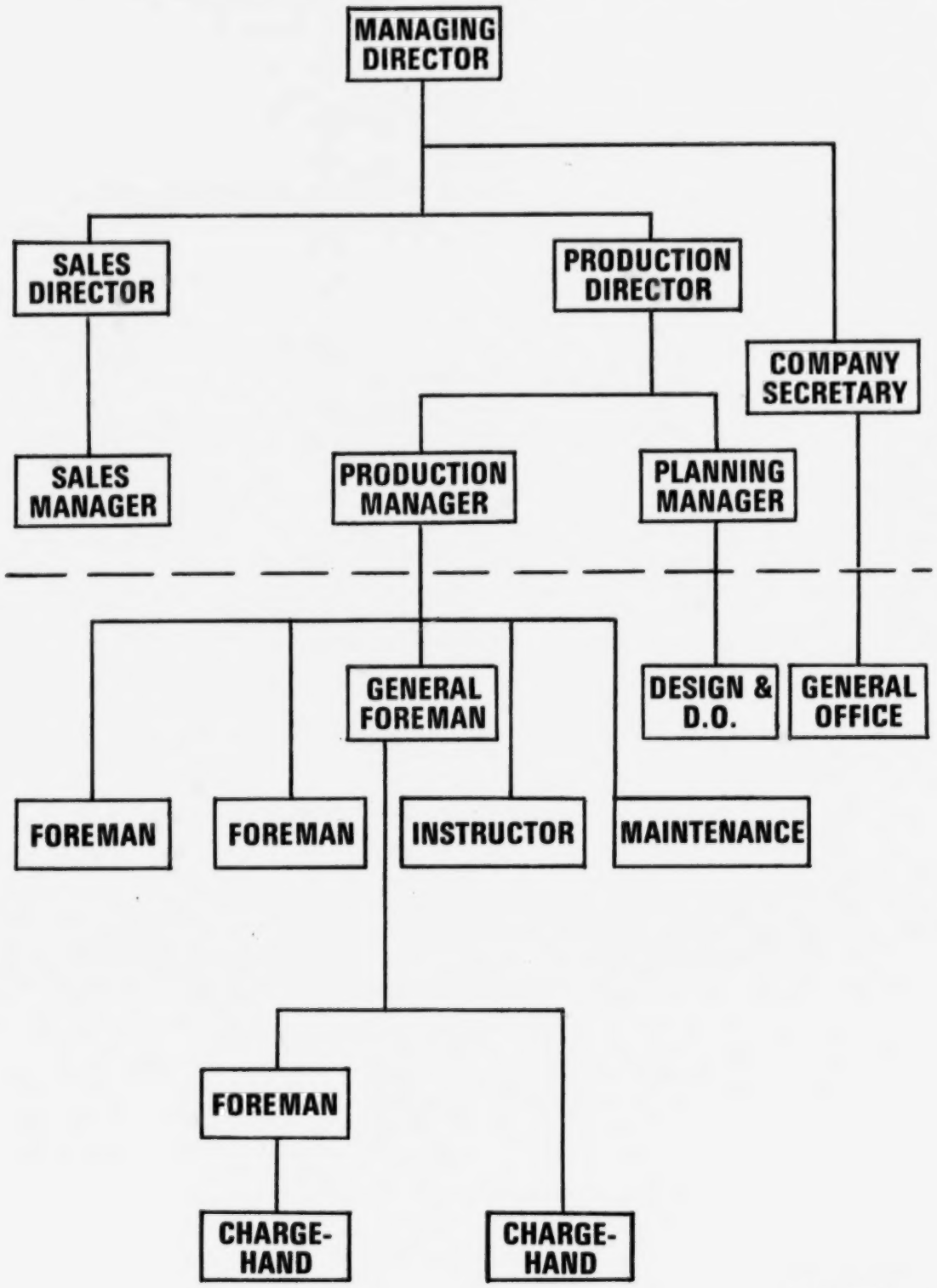
ORGANISATION CHART

1 Existing Management Structure (above broken line)



ORGANISATION CHART

2 Future Management Structure (above broken line)



3. Age Range of Existing Managers

Managing Director	—	55 +
Production Director	—	55 +
Sales Manager	—	55 +
Company Secretary	—	50 +
Planning Manager	—	40
Production Manager	—	40 +
General Foreman	—	40 +
Foreman (Stores & Cutting)	—	50 +
Foreman (Erection)	—	40 +
Instructor	—	60 +
Foreman (Fabrication)	—	60 +
Charge-hand (Fabrication)	—	30 +
Charge-hand (Assembly)	—	40

(The above information could be shown adaquately on the Organisation Charts)

4. Method of recruitment to fill future management vacancies due to normal retirement, early retirement, death or expansion

Managing Director	*to be succeeded by*	Production Director
Production Director	*to be succeeded by*	Production Manager or Planning Manager
Sales Director	*to be succeeded by*	
Company Secretary	*to be succeeded by*	Accountant
Production Manager	*to be succeeded by*	General Foreman
Planning Manager	*to be succeeded by*	
General Foreman	*to be succeeded by*	Charge-hand
Foreman	*to be succeeded by*	Charge-hand

5. (*a*) Training for Existing Managers

Training is being formalised from the Management Job Specification attached.

(*b*) Training and Development for Future Promotion

Supervisor Training is being formalised on an individual assessment programme from the existing Job Analysis schedules.

6. Management Succession Chart

Job Title	Job Holder	1st Choice for succession	2nd Choice for succession	REMARKS Succession (Internal or External)
Managing Director	A. Brown	Production Director	Advertise External	
Production Director	C. Doyle	Production Manager	Planning Manager	
Sales Director	Vacant	Advertise External		
Company Secretary	N. Orme	Accountant	Advertise External	
Production Manager	E. Fry	General Foreman	Advertise External	
Planning Manager	G. Hand	Advertise External		
General Foreman	J. Kay	Charge-hand	Charge-hand	
Foreman	L. Mann	Charge-hand	Charge-hand	

7A Job Specification

Position in Company:	MAINTENANCE ENGINEER
Responsible to:	TECHNICAL DIRECTOR
Departments controlled:	PLANT MAINTENANCE, MACHINE MAINTENANCE, SAFETY AND SECURITY

BASIC FUNCTION

Responsible for the maintenance, up-keep and repair of the factory plant, tools, equipment and facilities.

JOB DESCRIPTION — Specific Responsibilities

(*a*) **Organisation**
To install production plant facilities, to maintain an inventory of the plant, tools and equipment installed in the factory.

(*b*) **Finance**
To prepare the annual budget for the department in accordance with budgets set for the period and to keep under progressive review actual performance compared with budgeted target as a means of improving operational effectiveness.

(*c*) **Personnel**
To organise and manage all the personnel involved in accordance with Company policy.

(*d*) **Plant and Equipment**
To maintain, service and repair and keep in effective and economical operating condition the buildings, plants, facilities and equipment and to ensure compliance with all relevant laws and regulations.

(*e*) **General**
To be responsible for adequate fire control facilities, to ensure compliance with the Factories Acts and Health and Safety requirements in the departments under his control.

LIAISON

(*a*) **Internal (Production, Accounts, Sales, Maintenance, etc.)**
All departmental heads.

(*b*) **External (Suppliers, Sub-Contractors, etc.)**
Suppliers and external contractors.

7B JOB ANALYSIS

Position in Company:	MAINTENANCE ENGINEER
Responsible to:	TECHNICAL DIRECTOR
Departments controlled:	PLANT MAINTENANCE, MACHINE MAINTENANCE, SAFETY AND SECURITY

(*a*) Personal Qualities

Ability to organise, plan and delegate.
Leadership, initiative and drive.

(*b*) Technical Ability

Ability to co-ordinate engineering activities to meet production requirements.

(*c*) Management Experience

A wide experience of factory engineering operations required with appreciation of production requirements.

SAMPLE DOCUMENTATION (continued)

7C **Staff Review**

CONFIDENTIAL

Name of Employee **N. POTTER** Age: **35**

Present Job: **Maintenance Engineer** Length of service in present job **2 years**

Review carried out by: **Technical Director** *Date* **March 1968**

1. REVIEW OF PERFORMANCE

Performance satisfactory but requires further experience in present job particularly in planned maintenance, fabric repair and budgetary control of building work.

2. SUITABILITY FOR PROMOTION

With further experience and planned training will be suitable for a more senior position.

3. FURTHER EXPERIENCE AND TRAINING

Requires external courses on planned maintenance, principles of budgeting and fabric maintenance.

4. COMMENTS OF THE REVIEWER'S IMMEDIATE SUPERVISOR

As above.

5. COMMENTS OF HEAD OF DEPARTMENT

Managing Director's comments:—

Contact Engineering Employers' Association Secretary for advice from the Training & Education Officer of suitable training facilities.

7D Assessment of Training Needs

Position in Company:	MAINTENANCE ENGINEER
Responsible to:	TECHNICAL DIRECTOR
Form completed by:	Senior executive responsible for management training and development in consultation with a training adviser from a Consultancy Organisation or Group Training Scheme or Employers' Association.

TRAINING REQUIRED

The previous experience of the Maintenance Engineer has been on mechanical engineering with some electrical experience. There has been a deficiency due to training not being given before appointment to present position. Training is required in planned and effective maintenance, budgetary control, cost and estimating, building repair and construction, application of work study, industrial and human relations, communications.

Signed .....
MANAGING DIRECTOR.

7E Training Programme

Position in Company: MAINTENANCE ENGINEER

Responsible to: TECHNICAL DIRECTOR

TRAINING PROPOSALS

External Courses

Budgetary Control Planned Maintenance Building Subjects	Technical College
Work Study Industrial Relations and Human Relations	Employers' Association Service

Internal Courses

Job Instruction Job Methods Job Safety	T.W.I. Trained Instructor
Company Policy	Directors

This trainee would benefit from the Diploma in Management Studies Course when he is available for release on a long term basis.

8A Job Specification

Position in Company: SALES MANAGER

Responsible to: COMMERCIAL DIRECTOR

Departments controlled: SALES REPRESENTATIVES, SALES ADMINISTRATION

BASIC FUNCTION

Responsible for the direct supervision and control of the Sales Department and for representing the Company in the selling of products.

JOB DESCRIPTION — Specific Responsibilities

(*a*) **Organisation**
To promote and foster the demand for the Company's products and to develop new markets. To prepare sales forecasts by estimating customers future requirements and analysing market trends of the demand for products. To be the principal Company representative in matters relating to the selling and distribution of products to all customers. To establish product sales and distribution policies.

(*b*) **Finance**
To provide the pricing structure including the establishment of trade terms, discounts and allowances. To prepare the annual budget of costs for the department in accordance with objectives set for the period and to keep under progressive review actual performance compared with the budgeted target, as a means of improving operational effectiveness.

(*c*) **Personnel**
To organise and manage all the personnel involved in accordance with Company policy.

LIAISON

(*a*) **Internal (Production, Accounts, Sales, Maintenance, etc.)**
Production Manager, Finance and Administration.

(*b*) **External (Suppliers, Sub-Contractors, etc.)**
Customers, Advertising Agencies, Trade Associations.

8B Job Analysis

Position in Company: SALES MANAGER

Responsible to: COMMERCIAL DIRECTOR

Departments controlled: SALES REPRESENTATIVES, SALES ADMINISTRATION

(*a*) Personal Qualities

Must possess the personal qualities required for representing the Company and for dealing with customers — gaining their confidence and respect.

(*b*) Technical Ability

Ability to plan effectively and be able to control sales performance and results.

Ability to develop and apply marketing techniques.

(*c*) Management Experience

Prior to appointment as Sales Manager should have spent a number of years on marketing, sales administration and as a representative.

9A Job Specification

Position in Company: COST ACCOUNTANT

Responsible to: COMPANY SECRETARY

Departments controlled: COST OFFICE

BASIC FUNCTION

Responsible for the direction, supervision and control of the Cost Accounting function, for factory cost control and for the compilation of factory expenditure budgets.

JOB DESCRIPTION — Specific Responsibilities

(*a*) **Organisation**

To organise and install effective and efficient procedures for the collection, calculation and presentation of control information concerning material, labour and overhead expenditure and to maintain an adequate system for determining product costs. To keep the people concerned continually informed of expenditure against their budget and to bring to their notice all possible economies which may lead to cost reductions.

(*b*) **Finance**

To submit such financial, cost, out-put and efficiency returns and statements to the Company Secretary and to other departmental managers.

(*c*) **Personnel**

To organise and manage all personnel involved in accordance with Company policy.

LIAISON

(*a*) **Internal (Production, Accounts, Sales, Maintenance, etc.)**

Company Secretary and all Managers incurring expenditure.

(*b*) **External (Suppliers, Sub-Contractors, etc.)**

None.

9B Job Analysis

Position in Company: COST ACCOUNTANT

Responsible to: COMPANY SECRETARY

Departments controlled: COST OFFICE

(*a*) **Personal Qualities**

Ability to communicate accounting information simply and objectively to all other Managers so that the purpose and operation of budgets and financial controls are clearly understood.

(*b*) **Technical Ability**

Must be trained and experienced in management-accounting techniques.

(*c*) **Management Experience**

Must be familiar with Office Management techniques and Organisation and Method work.

1. MANAGEMENT SUCCESSION CHART

Job Title	Job Holder	1st Choice for succession	2nd Choice for succession	REMARKS Succession (Internal or External)

2. Job Specification

Position in Company: .....

Responsible to: .....

Departments controlled: .....

.....

BASIC FUNCTION

JOB DESCRIPTION — Specific Responsibilities

(*a*) **Organisation**

(*b*) **Finance**

(*c*) **Personnel**

(*d*) **Plant and Equipment**

(*e*) **General**

LIAISON

(*a*) **Internal (Production, Account, Sales, Maintenance, etc.)**

(*b*) **External (Suppliers, Sub-Contractors, etc.)**

3. Job Analysis

Position in Company: .....

Responsible to: .....

Departments controlled: .....

.....

(*a*) Personal Qualities

(*b*) Technical Ability

(*c*) Management Experience

4. Staff Review

CONFIDENTIAL

Name of Employee ..... Age: .....

Present Job: ..... Length of service in present job .....

Review carried out by: ..... *Date*.....

1. **REVIEW OF PERFORMANCE**

2. **SUITABILITY FOR PROMOTION**

3. **FURTHER EXPERIENCE AND TRAINING**

4. **COMMENTS OF THE REVIEWERS' IMMEDIATE SUPERVISOR**

5. **COMMENTS OF HEAD OF DEPARTMENT**

7

1. Recommended Reading

An approach to the

TRAINING & DEVELOPMENT OF MANAGERS

A Report by the
Management Training and Development
Committee

Published by the MINISTRY OF LABOUR (Central Training Council)
— Price 1/6d. —

This booklet deals, inter alia, with:—

Features of Good Training

(i) Assignment of responsibility for Management Training and Development; analysis of managerial job; and assessment of present and future needs at the management level.

(ii) Recruitment and Selection:
maintenance of personal records; and appraisal;
leading to

(iii) Construction and operation of systematic programmes of education, training and development.

(iv) Training Activities;
Induction Courses
Broadening experience
Individual and group projects
Planned and Directed visits
Short Courses, discussions or talks within the firm.

(v) Management Development Courses;
Courses on specialist subjects

Specialised aspects — Industrial Relations
Finance
Production Control
Sales Management

Technique (Tool) Subjects — Work Study
Operational Research
Computer Application
Foreign Languages

(vi) Construction and Operation of Training Programmes;
Information required to improve a managers performance:—

Job Analysis and Job Specification.

Company needs — present and future in terms of jobs to be filled.

Personal Records.

Periodic appraisal of individual performance and career potential.

7 2.

THE MAKING OF MANAGERS

FINAL REPORT OF THE B.I.M. MANAGEMENT DEVELOPMENT SCHEMES COMMITTEE

Published by the British Institute of Management — Price 21/-

(*a*) Scheme for Management Development

1. Appraisal of Company's present and future structure, then assess resources of managerial ability available.
2. Regular and systematic enquiry will indicate its ability to meet future managerial commitments.
3. Regular review of recruitment at all levels, with the completion of education of those employees who may be suitable for management posts later.
4. Appraisal of individual manager's knowledge and skill to cope with demands of future responsibilities for which he is intended and formulate planned experience programmes.
5. Teach future managers the purpose and nature of the business to which they belong. To give a general understanding of the policies of the firm and its organisational structure. To train in the functional fields of manufacture, marketing, finance. Use of Company Staff Colleges, Employer Association Centres, Local Colleges of Further Education or National Organisations.
6. Appraisal and review of Company's management development scheme.

(*b*) Objectives to meet the Requirements of Individuals

1. (a) To provide managers with the opportunity of keeping abreast of developments in their own and related fields so as to assist them to function to their maximum effectiveness in their jobs and to prepare them to meet any additional responsibilities.
   (b) To encourage managers to develop their subordinates.
   (c) To secure recognition of those showing promise in the organisation by means of careful planning.

2. Objectives to meet the needs of the organisation.
   (a) To raise the general level of managerial competence throughout the company.
   (b) To provide a continuous supply of trained and competent managers to fill future vacancies.

1. Far to many firms use ad hoc methods for training and development.
2. Each company must work out its own plan.
3. Define objects of management development programme.
4. Obvious and continuous management support is necessary.
5. Top management alone can decide strategy, define future needs, decide priorities and influence line managers to assume their responsibilities.

(*c*) Job Specification

A job specification should cover the following factors:—

1. Function of the job (a concise statement of its prime purpose in relation to the total organisation).
2. Responsibilities and duties.
3. Limits of authority (in terms of capital equipment, expense, personnel, etc.).
4. Committee memberships.
5. Outside contacts.
6. Job requirements — personal attributes (education, experience, specific knowledge and ability, temperament, motivation, special demands of the job.)

(*d*) Planning Management Succession

A DUTY OF TOP MANAGEMENT TO EXAMINE

1. The way Company policy affects management succession plans — major changes in sales or production, personnel policy, etc.
2. The management position in the coming year and in the foreseeable future; Positive changes anticipated. Known requirements; Anticipated losses by transfer, wastage, etc. Nominated replacements to meet this immediate situation.
3. Wastage over the previous year with an analysis of the reasons.
4. The recruitment programme of last year in comparison with the requirements forecast.
5. The training and career development plans of last year, their adequacy and the progress made.
6. The quality and strength of existing staff as revealed by the current appraisal.
7. Development plans for established and potential managers.

(*e*) Management Needs

To forecast management needs it is essential:—

1. To study present organisation.
2. Allow for known and planned retirement and expansion — project chart — interim phases.
3. Analyse jobs — present and future — job specification — define major aspects and needs in terms of personal attributes — skill, knowledge, etc.
4. Appraisals are vital to take stock of the company's executive talent.
5. Replacement planning needs the special attention of a senior committee.

(*f*) Assessment of Management Resources

1. Assessment of individual performance in present job.
2. Assessment of potential for higher managerial positions.
3. Readiness for promotion.
4. Ways to develop men in their present positions.
5. Ways to develop men for promotion.

(*g*) Development Plans

Development plans must be tailor made to the needs of the individual. The most important factor in a man's development is his boss. Rotational experience, secondments and training courses have a contribution to make.
Management courses should be carefully selected and individuals not only briefed before they go, but seen on their return in order to extract the maximum benefit from the Course.

(*h*) Source of Potential Managers

Graduate Apprenticeship
Graduate Management Traineeship
Craft Apprenticeships
Technical Apprenticeships
Commercial Apprenticeships

ERIC Clearinghouse
APR 14 1969
on Adult Education